

ESTIMATED RELOCATION EXPENSE WORKSHEET

Note to the employee: Congratulations on your new position! We want your relocation experience to be a pleasant one. Please note that you must not begin travel or incur expenses until after this form has been completed, along with the CD-150, Service Agreement, and an approved "Form, CD-29, Travel Order." If you have any questions regarding your relocation or the completion of this form, please contact the Relocation Specialist at the servicing Finance Office below. In addition, you should have the name and phone for your Gaining Office Contact who will prepare your relocation documents, as well as the name and phone number for your Authorizing Official.

CONTACTS:

Gaining Office Contact (Document Preparer)

Servicing Finance Office:

Eastern Administrative Support Center (EASC)
Central Administrative Support Center (CASC)
Mountain Administrative Support Center (MASC)
Western Administrative Support Center (WASC)
Washington D.C. Metro Area Payment Office,
NOAA Travel Policy Office
NOAA Travel Policy Office
Accounting Operations Division (AOD)

Phone number

Telephone Number

(757) 441-6527
(816) 426-7828
(303) 497-6199
(206) 526-4426

(301) 444-2155
(301) 444-2136
(301) 444-2782

Fax Number

Relocation Specialist

Wanda Gonsalves
Donna Newport
Steve Tatum
Deanna Trosper

Pat Oliver (relocation policy)
Rachael Wivell (relocation policy)
Nanette Naylor-Bah (voucher auditor)

INSTRUCTIONS: This form must be completed **before** the travel order is completed. Once this form is completed, it must be submitted to your servicing Relocation Specialist, and your gaining office contact, along with the signed travel order and signed CD-150, Service Agreement.

Employee: Must complete Section I.

If you are a new appointee, you are limited to transportation costs for en route travel for both you and your immediate family, per diem for en route travel for you only, and transportation and storage of your household goods.

If you are a transferee, you are entitled to most of the relocation entitlements stated herein. You will need to coordinate with your authorizing official on discretionary entitlements, such as a househunting trip and/or temporary quarters. Your CD-150, Service Agreement provides you the opportunity to explain your needs and/or special circumstances.

Gaining Office Contact (Document Preparer): Must complete Sections II - IX after Section I has been completed, as well as the travel order. Please note that once the computations are completed for Sections II - VIII, their totals are recorded in Section IX. Totals from Section IX are then recorded in block 11 of the travel order.

This form is intended to be a tool to help estimate relocation costs and will be used by the servicing Finance Office to enter the relocation costs into the Integrated Travel Manager Relocation (ITMR) system, as well as obligate the expenses into the Core Financial System (CFS). It does not replace the travel order as the official travel authorization or denote eligibility to these entitlements, nor does it estimate the Relocation Income Tax Allowance (RITA), Federal Insurance Contributions Act (FICA), and Health Insurance Tax (HIT). The RITA, FICA, and HIT will be calculated by the ITMR system and obligated in the CFS.

I. GENERAL INFORMATION (May be completed by the employee)

It is extremely important that the information provided in this section is completed in its entirety and as accurately as possible. Data provided in this section determines entitlements, taxability of relocation expenses (see IRS Publication 521), and the mailing address used to issue the IRS Form W-2 which reports relocation expenses. Note: NOAA issues IRS Form W-2s separately from the W-2s that report salary. The address provided on this form will only affect the mailing address for the IRS Form W-2 which reports relocation expenses.

Employee Residence Address: _____

Retirement Plan: ☐ CSRS ☐ FERS ☐ Other (CSRS-OFFSET)

Filing Status: ☐ Married Filing Separately ☐ Single
 ☐ Married Filing Jointly ☐ Head of Household

Estimated Annual Earnings: Employee _____ Self Employed _____
 Spouse _____ Self Employed _____

Tax State: _____ Percentage: Expressed as a % of:

Tax Rates (if known) County _____ ☐ Income ☐ Federal Tax ☐ State Tax
 City _____ ☐ Income ☐ Federal Tax ☐ State Tax
 Other _____ ☐ Income ☐ Federal Tax ☐ State Tax

Relocation Special Status: ☐ Transferee (*Employee who transfers from one Federal location to another*)
 ☐ New Appointee (*1st time Federal employee, or returning Federal employee, or student Trainee*)
 ☐ SES Separation for Retirement
 ☐ Overseas Tour Renewal
 ☐ Overseas to U.S. Return for Separation
 ☐ Reduction in Force Relocation

Distance: Old Residence to Old Duty Station
 Old Residence to New Duty Station
 Old Duty Station to New Duty Station

II. HOUSEHUNTING TRIP (FTR 302-5) (May be completed by the Gaining Office Contact (Document Preparer))

Maximum of 10 days can be authorized. Locality rate will be used for all househunting trips. When driving by POV, calculate per diem based on driving 300 miles per day.

Approximate Travel Dates: Begin _____ End _____

Cost of Per Diem

LODGING

Employee (or spouse traveling in place of employee):

Daily lodging rate \$ _____ x _____ # of nights \$ _____

Spouse accompanying or traveling separately from the employee:

Daily lodging rate \$ _____ x _____ # of nights = _____ x .75 \$ _____

M&IE:

Employee (or spouse traveling in place of employee):

Daily M&IE rate \$ _____ x 2 = _____ x .75 \$ _____

(First & Last Days)

Daily M&IE rate \$ _____ x _____ # of days \$ _____

(Full Days)

Spouse accompanying or traveling separately from the employee:

Daily M&IE rate \$ _____ x 2 = _____ x .75 \$ _____

(First & Last Days)

Daily M&IE rate \$ _____ x _____ # of nights = \$ _____

Total M&IE for \$ _____ + Total M&IE \$ _____ = \$ _____ x .75 = \$ _____

(First and Last Days) (Days in between)

Total Per Diem (Lodging and M&IE)

\$ _____

Copy to Section IX (i)

Cost of Transportation

Common Carrier: (Charged to either CBA or Citibank travel card)

\$ _____

Copy to Section IX (a)

Other Transportation:

POV- (40.5¢ per mile)

of miles _____ x _____ ¢ per mile \$ _____

Taxi Fares \$ _____

Rental Car \$ _____

Total Other Transportation

\$ _____

Copy to Section IX (g)

Other (Miscellaneous) Expenses

Tolls, Parking, Hotel Tax, etc....

\$ _____

Copy to Section IX (k)

TOTAL HOUSEHUNTING TRIP

\$ _____

III. TRAVEL EN ROUTE TO NEW DUTY STATION (FTR 302-4) (May be completed by the Gaining Office Contact (Document Preparer))
For CONUS, the per diem rate for en route travel is the standard CONUS rate (\$70 for Lodging and \$39 for M&IE). For OCONUS, the per diem rate is the locality rate. When driving by POV, calculate per diem based on driving 300 miles per day.

Approximate Travel Dates: Begin _____ End _____

Rate Authorized: G Standard CONUS Rate G OCONUS Locality Rate

If driving POV: # of miles from old ODS to new ODS _____) 300 miles = _____ # of en route per diem days

Cost of Per Diem (Immediate family members of new appointees are not entitled to per diem (lodging and M&IE).)

LODGING

Employee:

Daily lodging rate \$ _____ x _____ # of nights \$ _____

Spouse accompanying the employee

Employee lodging total \$ _____ x .75 \$ _____

Spouse traveling separately from employee

Employee lodging total \$ _____

Dependents 12 years of age & over:

of dependents _____ x employee lodging total _____ = _____ x .75 \$ _____

Dependents under 12 years of age: compute as follows:

of dependents _____ x employee lodging total _____ = _____ x .50 \$ _____

M&IE

Employee:

Daily M&IE rate \$ _____ x 2 = _____ x .75 \$ _____

(First & Last Days)

Daily M&IE rate \$ _____ x _____ # of days \$ _____

(Full Days)

Total Employee M&IE \$ _____

Spouse accompanying the employee

Employee M&IE total \$ _____ x .75 \$ _____

Spouse traveling separately from employee

Employee M&IE total \$ _____

Dependent 12 years of age & over:

of dependents _____ x employee M&IE total _____ = _____ x .75 \$ _____

Dependent under 12 years of age: compute as follows:

of dependents _____ x employee M&IE total _____ = _____ x .50 \$ _____

Total Per Diem (Lodging and M&IE) for Enroute

\$ _____

Copy to Section IX (j)

Cost of Transportation

Common Carrier (Charged to either CBA or Citibank travel card)

\$ _____

Copy to Section IX (b)

Other Transportation

POV -Rate determined by the number of occupants in the vehicle:

One occupant @ 15¢ per mile, two occupants @ 17¢ per mile,

three occupants @ 19¢ per mile, and four or more occupants @ 20¢ per mile

POV 1 # of miles _____ x _____ ¢ per mile \$ _____

POV 2 # of miles _____ x _____ ¢ per mile \$ _____

Total Cost of Other Transportation

\$ _____

Copy to Section IX (h)

Other (Miscellaneous) Expenses

Tolls, Parking, etc...

\$ _____

Copy to Section IX (l)

TOTAL ENROUTE TRIP

\$ _____

IV. COST OF SUBSISTENCE WHILE OCCUPYING TEMPORARY QUARTERS (FTR 302-6) (May be completed by the Gaining Office Contact (Document Preparer))

Maximum of 120 days can be authorized. For CONUS, the per diem rate for temporary quarters is the standard CONUS rate (\$70 for lodging and \$39 for M&IE), and for OCONUS, the per diem rate is the locality rate.

Approximate Begin Date: _____ Rate Authorized: ☐ Standard CONUS Rate ☐ OCONUS Locality Rate

First 30 days:

LODGING:

Employee: Daily lodging rate \$ _____ x _____ # of nights = _____ \$ _____

Spouse: Daily lodging rate \$ _____ x _____ # of nights = _____ x .75 = _____ \$ _____

Dependents 12 yrs & over:

of dependents _____ x Daily lodging rate \$ _____ = _____ x
_____ # of nights = _____ x .75 = _____ \$ _____

Dependents under 12 yrs:

of dependents _____ x Daily lodging rate \$ _____ = _____ x
_____ # of nights = _____ x .50 = _____ \$ _____

M&IE

Employee: Daily M&IE rate \$ _____ x _____ # of days = _____ \$ _____

Spouse: Daily M&IE rate \$ _____ x _____ # of days = _____ x .75 = _____ \$ _____

Dependents 12 yrs & over:

of dependents _____ x Daily M&IE rate \$ _____ = _____ x
_____ # of days = _____ x .75 = _____ \$ _____

Dependents under 12 yrs:

of dependents _____ x Daily M&IE rate \$ _____ = _____ x
_____ # of days = _____ x .50 = _____ \$ _____

Total Per Diem (Lodging and M&IE) for the first 30 days Temporary Quarters \$ _____

31 to 60 days (When authorized):

LODGING

Employee: Daily lodging rate \$ _____ x _____ # of days = _____ x .75 = _____ \$ _____

Spouse: Daily lodging rate \$ _____ x _____ # of days = _____ x .50 = _____ \$ _____

Dependents 12 yrs & over:

of dependents _____ x Daily lodging rate \$ _____ = _____ x
_____ # of days = _____ x .50 = _____ \$ _____

Dependents under 12 yrs:

of dependents _____ x Daily lodging rate \$ _____ = _____ x
_____ # of days = _____ x .40 = _____ \$ _____

M&IE

Employee: Daily M&IE rate \$ _____ x _____ # of days = _____ x .75 = _____ \$ _____

Spouse: Daily M&IE rate \$ _____ x _____ # of days = _____ x .50 = _____ \$ _____

Dependents 12 yrs & over:

of dependents _____ x Daily M&IE rate \$ _____ = _____ x
_____ # of days = _____ x .50 = _____ \$ _____

Dependents under 12 yrs:

of dependents _____ x Daily M&IE rate \$ _____ = _____ x
_____ # of days = _____ x .40 = _____ \$ _____

Total Per Diem (Lodging and M&IE) for the 31-60 days Temporary Quarters \$ _____

AMENDMENTS ONLY:

61 to 90 days (When authorized) - (Computed at same rate as 31-60 days) \$ _____

91 to 120 days (When authorized) - (Computed at same rate as 31-60 days) \$ _____

TOTAL TEMPORARY QUARTERS:

\$ _____
Copy to Section IX (n)

V. TRANSPORTATION OF HOUSEHOLD GOODS (MAX. 18,000 lbs.), TEMPORARY STORAGE (90 DAYS), and TRANSPORTATION OF POV (FTR.302-7, FTR 302-9): (May be completed by the Gaining Office Contact (Document Preparer))

When an employee assumes responsibility for the transportation of household goods, he is reimbursed under the commuted rate system. Under the actual expense method, the Government arranges for both the payment and transportation of household goods. Contact your servicing transportation specialist for an estimate on household goods:

Transferee's New Duty Station Serviced by:

Eastern Administrative Support Center (EASC)
Central Administrative Support Center (CASC)
Mountain Administrative Support Center (MASC)
Western Administrative Support Center (WASC)
Accounting Operations Division (AOD)

Telephone Number

(757) 441-6468
(816) 426-7822
(303) 497-6199
(206) 526-4430
(202) 619-8933

Transportation Specialist

Anita Holley
Debbie Ferrara
Steve Tatum
Kevin Godfrey
Mathis Gardner

Transportation and Storage of Household Goods/Transportation of POV

Actual Expense Method (Commercial Bill of Lading)

Shipping of Household Goods \$ _____
Mobile Home Transportation \$ _____
(in lieu of household goods transaction)

\$ _____

Copy to Section IX (c)

Transportation of POV

\$ _____

Copy to Section IX (d)

Temporary Storage of Household Goods

\$ _____

Copy to Section IX (e)

Total Transportation and Storage of Household Goods/Transportation of POV
Billed to Government

\$ _____

Commuted Rate System

Shipping of Household Goods \$ _____
Mobile Home Transportation \$ _____
(in lieu of household goods transaction)

\$ _____

Copy to Section IX (o)

Transportation of POV

\$ _____

Copy to Section IX (p)

Temporary Storage of Household Goods

\$ _____

Copy to Section IX (q)

Total Transportation and Storage of Household Goods/Transportation of POV
Paid to Employee

\$ _____

**TOTAL TRANSPORTATION and STORAGE OF HOUSEHOLD GOODS/
TRANSPORTATION OF POV**

\$ _____

VI. EXTENDED STORAGE OF HOUSEHOLD GOODS (FTR 302-8)

Commercial Bill of Lading

Extended Storage of Household Goods

\$ _____

Copy to Section IX (f)

Commuted

Extended Storage of Household Goods

\$ _____

Copy to Section IX (r)

TOTAL EXTENDED STORAGE OF HOUSEHOLD GOODS

\$ _____

VII. REAL ESTATE (FTR 302-11 & FTR 302-12) (May be completed by the Gaining Office Contact (Document Preparer))

Old Residence - *Select only one.*

NOAA's Home Sale Program:

(Percentages effective 1/1/04 and subject to change)

Buyer Value Option (**day 1-60; buyer found**):

Selling price of old residence _____ x .1096 \$ _____

Amended Sale (**after appraisals are ordered; buyer found**):

Selling price of old residence _____ x .1301 \$ _____

Appraised Sale (**after 90 days; relocation company buys the home**):

Selling price of old residence _____ x .2258 \$ _____

Direct Sale

Estimated selling price of your old residence _____ x .10 \$ _____

Lease Breaking Expenses at Old Duty Station

(No property to sell) \$ _____

New Residence - *Select only one.*

NOAA's Home Purchase Program:

Estimated purchase price of new residence _____ x .05 \$ _____

(No fee for service)

Direct Purchase

Estimated Purchase price of new residence _____ x .05 \$ _____

TOTAL REAL ESTATE

\$ _____
Copy to Section IX (s)

VIII. MISCELLANEOUS EXPENSE ALLOWANCE (FTR 302-16) - *Select only one.*

Employee only:

\$500 or one week's basic gross pay, whichever is less \$ _____

Employee with immediate family:

\$1,000 or two week's basic gross pay, whichever is less \$ _____

TOTAL MISCELLANEOUS EXPENSE ALLOWANCE

\$ _____
Copy to Section IX (m)

IX. ESTIMATES FOR FORM CD-29 (May be completed by the Gaining Office Contact (May be completed by the Gaining Office Contact (Document Preparer)))		Enter these Totals in Block 11 of the CD-29:
SECTION A		
TRANSPORTATION (All expenses billed directly to the Government)	Common Carrier (Object Class 2143) Househunting (a) _____ Enroute (b) _____ Transportation of Household Goods - CBL (Object Class 2211) (c) _____ Transportation of POV- CBL (Object Class 2211) (d) _____ Storage of Household Goods - CBL (Object Class 2528) (e) _____ Extended Storage of Household Goods - CBL (Object Class 2528) (f) _____	\$
CD-29, Block 11A		
SECTION B		
OTHER TRANSPORTATION	Mileage, Taxi, Shuttle, Rental Car (Object Class 2140) Househunting (g) _____ Enroute (h) _____	\$
SUBSISTENCE EXPENSE (Per Diem /Actual)	Per Diem (Object Class 2140) Househunting (i) _____ Enroute (j) _____	\$
OTHER EXPENSES	Miscellaneous Expenses (Object Class 2140) Househunting (k) _____ Enroute (l) _____ Miscellaneous Expense Allowance (Object Class 1216) (m) _____	\$
TEMPORARY QUARTERS	Temporary Quarters (Object Class 1209) (n) _____	\$
RELOCATION EXPENSES (Other than listed above)	Transportation Household Goods - Commuted Rate System (Object Class 2211) (o) _____ Transportation of POV - Commuted Rate System (Object Class 2211) (p) _____ Storage of Household Goods - Commuted Rate System (Object Class 2528) (q) _____ Extended Storage of Household Goods - Commuted (Object Class 2528) (r) _____ Real Estate (Object Class 1214) (s) _____	\$
CD 29, Block 11, SUB - TOTAL B		\$
TOTAL ESTIMATED COST		
CD 29, Block 11, TOTAL A & B		\$